



## Simplify Manage Expedite AIA Billing for Sage Intacct

ProForm is a subscription-based software module that integrates AIA Billing capabilities directly into Sage Intacct's accounting platform. ProForm makes it easy for specialty trade contractors, subcontractors and specialized service providers to incrementally invoice for work completed on large scale projects with multiple milestones and long timelines.

### OVERVIEW

- Built on Sage Intacct's cloud-based accounting platform
- Designed for commercial subcontractors, specialty trade contractors, specialized service providers (i.e. fire, security, plumbing, heating and air, electrical, masonry, carpentry, roofing)
- Supports management of job costs on large-scale projects with multiple milestones
- Generates quick, accurate billing, that complies with the standard AIA G-702/G-703 billing forms
- Automates retention withholding calculations, General Ledger (GL) and Accounts Receivable (AR) transactions
- Simplifies invoice adjustments and change orders with automated reversal feature that updates GL and AR history
- Helps run your business more efficiently

### KEY BENEFITS

- Simplify/expedite AIA Billing process to increase cash flow
- Save time and reduce errors on applications for payment
- Increase productivity by eliminating redundant, time-consuming entries
- Drive operational efficiencies with automation

### REQUIREMENTS

- Get up and running quickly, stay connected
- Sage Intacct Core Financials, Platform Services, Order Entry, Basic Project Tracking (Project Dimension)
- Optional Functionality: Inventory, AvaTax

### Extend the Value of Your Sage Intacct Investment, Grow Your Business

Built upon Sage Intacct's cloud-based accounting platform, ProForm Billing for Contractors extends the value of existing technology investments with the ability to seamlessly push and pull information between Sage Intacct's platform and the ProForm module, making it easier to run a successful contracting business.

### Drive Operational Efficiencies, Reduce Errors

ProForm's full integration with Sage Intacct, eliminates the redundant data-entry required when project billing is managed in disparate systems and spreadsheets. This provides valuable benefits across the organization, such as reducing time-consuming data entry, reducing the potential for math errors that can cause applications for payment to be rejected and delay billing, as well as freeing up more time for strategic planning and forecasting.

### Simplify, Manage, and Expedite Billing to Improve Cash Flow

ProForm enables contractors to easily manage the project billing process throughout the lifecycle of the project. ProForm provides a framework for holding project information, managing the Schedule of Values (SOV), a method for calculating retainage percentages, making adjustments/change orders, automates GL and AR transactions, as well as merge information to create forms that support AIA Billing requirements. ProForm enables contractors to speed the billing process, improve cash flow, and support their ability to manage larger projects to grow their business.

### Key Features/Functionality

- Create new projects for customers within Sage Intacct
- Create/import Schedule of Values (SOV) for projects
- Automate retention withholding calculations and corresponding GL/AR transactions
- Manage applications, change orders, adjustments, and percentage complete
- Automate reversals on retainage and corresponding GL/AR entries
- Calculate tax on invoices
- Create summary invoices that can be sent to clients
- Create forms compliant with AIA Billing G-702 and G-703